

BWSR Academy

Building a Better Organization

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Session Overview

Board and Staff Roles

Examples of Balanced Organizations

Board Meetings

Strategic Planning

Prioritization Exercise

Audience Feedback/Examples

Basic Function of a LGU

Serve the good of the people at the lowest level of government.

Two parties working together to achieve results:

Board – Sets Direction, Hires, Evaluates

Staff – Implements, Manages, Operates

Board and Staff

Working together to achieve results! Stay on course.



Board Member Role

Policy Development

Planning

Budget Oversight

Working cooperatively with other Board members and staff

Board Member Role

Policy Development

Focus should be setting overall policy and long-term objectives not day-to-day operations.

Examples:

- Personnel policies

- Charges for services or fees

- Operational policies

Board Member Role

Policy Development



Key point:

Although it's the Boards responsibility to develop policy and staff is responsible to implement it, the most useful policies are developed with staff input.

Board Member Role

Planning

Guiding long-range planning and development

Budgets

Adopting annual budgets and long term capital improvement plans

Board Member Role

Planning and Budgets



Key Points:

Consider holding a Planning Session with Board and staff at least once every 5 years.

Consider having quarterly financial reviews with Board to evaluate your progress with annual budget and discuss financial matters.

Board Member Role

Working Cooperatively

Lead staff person should be the Board's contact to supervising the operations of the organization.

The Board should work closely with lead staff person to:

- Delegate work priorities to employees
- Develop budgets and provide financial statements
- Develop and approve an employee evaluation system
- Look for new programs or expand existing programs
- Keep in contact and build relationships with partner organizations

Board Member Role

Working with Staff



Key Point:

The designated lead staff should be the funnel for which performance reviews of other staff are conducted.

The job description of the lead staff should include devotion of time to improving staff credentials.

Staff Role

Providing timely and accurate information

Carryout adopted policies of the Board

Implement adopted local water plans

Develop staff plans

Create partnerships and new opportunities

Seek training to develop skill sets

Educate Board members

Board and Staff

Role as Community Leader

As a local leader you help guide your community in natural resource issues by:

- Acting as local grassroots representative
- Acting as a spokesperson on conservation issues
- Use existing and new innovative programs to promote conservation

STRONG BOARD – WEAK STAFF

“Tension”

- All new ideas originate from Board
- Board makes almost all decisions
- Daily involvement of Board members
- Ignores advice of staff
- Staff not properly trained
- Staff afraid to take risks

STRONG STAFF – WEAK BOARD

“Tension”

- Board not properly oriented
- Board not informed on mission, budget and goals
- Staff originates all ideas
- Board advises the staff
- Staff decides, then informs Board

WEAK BOARD – WEAK STAFF

“Collapse”

- Board doesn't know specific responsibilities
- Administrator or manager not competent
- Books not kept properly; true financial condition not known
- Program results not measurable
- Board unaware of legal responsibilities
- Board deals with details not policy
- No clear definition of staff roles – lack of, or poor job descriptions

BALANCED ORGANIZATION

“Dynamic Tension”

- Board and staff competent
- Board deals with policy issues and planning
- Director/Manager carries administrative details through staff
- Committee responsibilities are well defined and active
- Ongoing orientation and training program for Board
- Leadership constantly evolving from Board

Staff and Board Relationship

In the long run,
Trust
is what makes the difference.

“You can observe a lot just by watching”

Yogi Berra

“When elephants fight, it is the grass that suffers”

African proverb

Board Meetings

- The Agenda - be clear of your purpose and requested action.

“Approve BWR grant”

or

“Authorization to submit FY15 Clean Water Fund Grant application for providing land conservation practices within the Trout Brook Watershed

- It is a good practice for the Chair and lead staff to coordinate agenda items

Board Meetings

- Meeting minutes are mandatory and should clearly state all Board actions
- Minutes are to be kept indefinitely for both regular and special meetings
- Stay away from personal opinions such as “a heated discussion occurred” in your minutes.

Board Meetings

- Provide support information on a timely basis to allow time for Board to adequately prepare
- Consider establishing Board Committees if necessary to reduce meeting length
- Consider a timeline for the meeting and sticking to it.

Board Meetings

Poor communication and poor agenda's will get us off course.



Strategic Planning

Back to Staff and Board Relationship?

“The single most important factor in board effectiveness is the existence of a common vision of what the organization consists of and where it is going”

Sharon Oster – *Strategic Management for
Nonprofit Organizations*

Strategic Planning

WHY?

Changing programs and activities

Need for a new communication plan

Changing budget

Need to relook at where and how staff time is being spent to prioritize

Strategic Planning

Various exercises can be used:

Stakeholder input and involvement

SWOT (Strengths, Weaknesses, Opportunities and Threats)

Green, yellow or red

Preserve, Change and Create

Hot, Warm, Cold

Upward trend, downward trend or about the same

Strategic Planning

Nine Step Conservation Planning Process (NRCS):

1. Identify Problems and Opportunities
2. Determine Objectives
3. Inventory Resources
4. Analyze Resource Data
5. Formulate Alternatives
6. Evaluate Alternatives
7. Make decisions
8. Implement Plan
9. Evaluate the Plan

Strategic Planning

Prioritization Exercise

Urgent

Not Urgent

Important



necessity



quality

Not Important

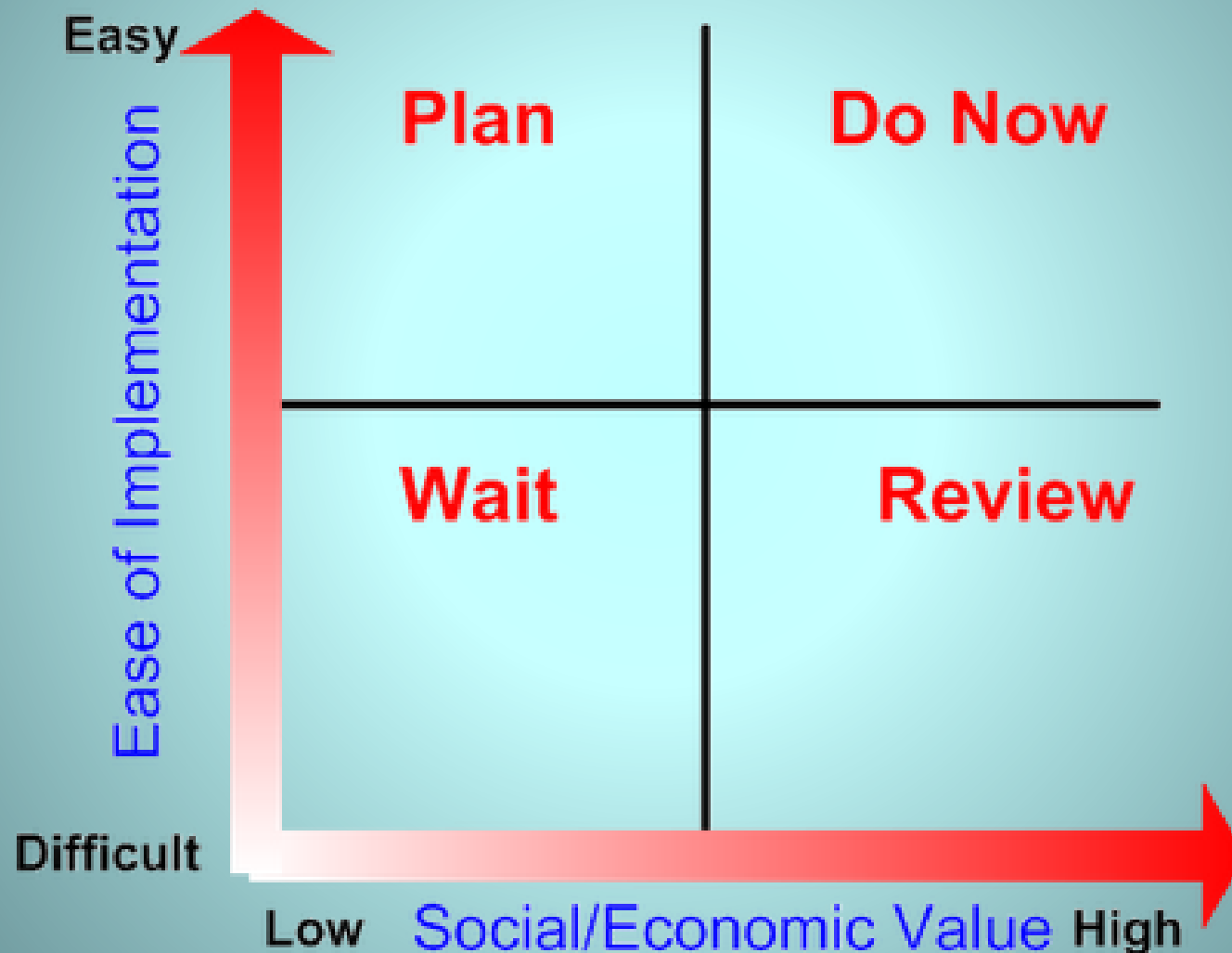


deception



waste

Priority Matrix



DID YOU GET
MY EMAIL?

WAS IT THE ONE
ABOUT YOUR TEXT
MESSAGE?

searchID:mfln135

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Keys to Building a Better Organization

1. Instill trust between Board, staff and partners
2. Create a culture focused on learning
3. Generate positive constructive feedback
4. Keep focus on your mission and priorities
5. Promote teamwork to create sense of accomplishment